SCHUTTE FINANCIAL℠
Believe in Your Heritage, Invest in Your Legacy

Personal Financial Success Guide

This checklist provides a holistic approach to protecting and growing your personal assets.

Insure: *Protect* Your Assets

Prepare for setbacks to protect who and what you value

☐ Complete estate plan (will; power of attorney; trust)

☐ Acquire adequate insurance (health; life; specialty)

☐ Identify long-term care plan (insurance or family)

☐ Support Medicare enrollment (fill gaps in coverage)

"One who is wise is cautious and turns away from evil, but a fool is reckless and careless."

Invest: *Grow* Your Assets

Contribute to your future and provide for those you love

☐ Complete financial plan (cash flow; debt reduction; asset projection)

☐ Set up personal portfolio management (general; emergency; IRA)

☐ Maximize employer retirement matching (401k; 403b)

☐ Increase income potential with education fund (college expenses)

"Wealth gained hastily will dwindle, but whoever gathers little by little will increase it."

Learn more or access free tips and tools at: SchutteFinancial.com/discover

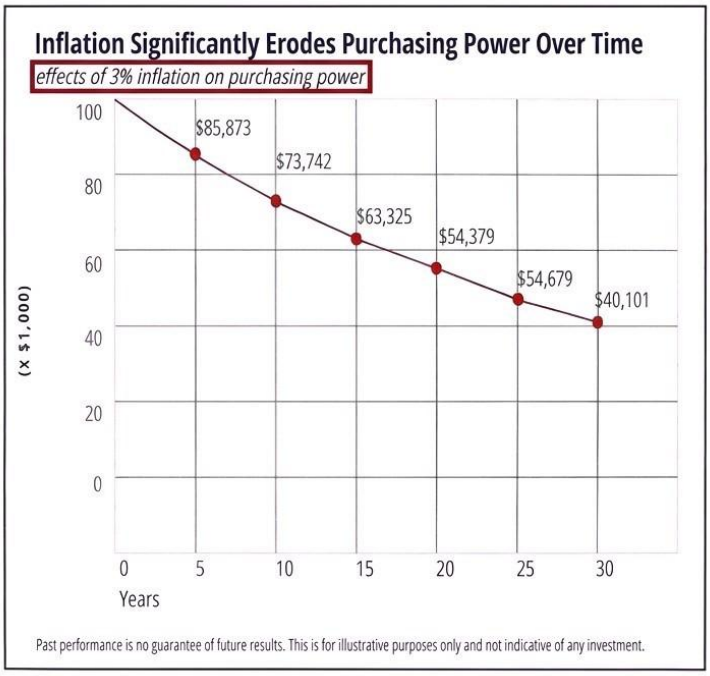
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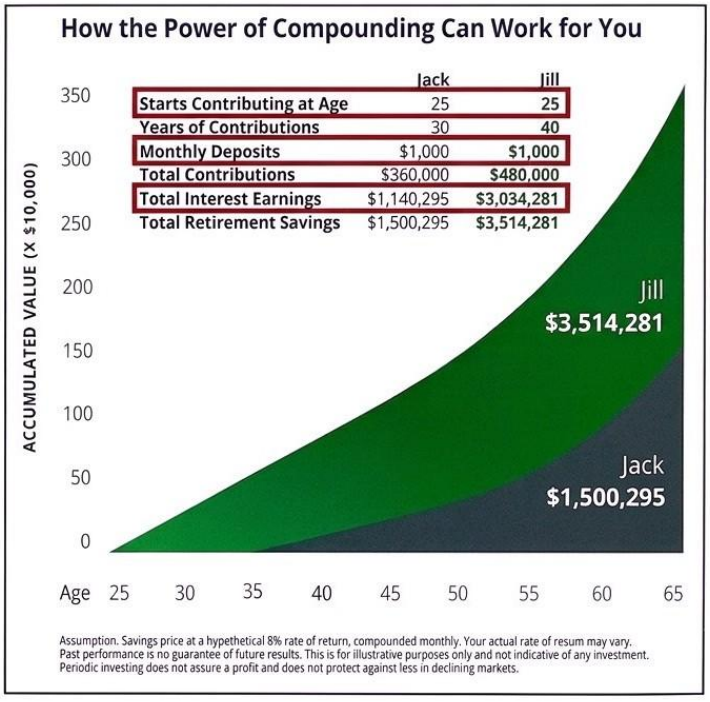
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Why Invest Now?

Waiting Could Cost You $Millions





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